Veronica Town - State Board of Assessors

From:

Dave Sipila

To:

coleappraisals@mchsi.com; jmvigen@ramslandvigen.com

Date:

8/24/2011 10:14 AM

Subject:

State Board of Assessors

CC:

Kerry Welsh; Mark Monacelli; Veronica Town

Attachments: ASSRScan063.PDF

John and Dawn:

I'm attaching some supplemental information that I gathered following the August 17th meeting of the Assessment Practices Review Panel. At that meeting there was a short discussion of the former St. Louis County Assessor's appearance at the State Board of Assessors to discuss the approval process for local assessors. The attached minutes of the State Board's meeting and subsequent meetings will document the State Board's actions on this issue.

--Dave

State Board of Assessors Meeting Minutes...continued

had been submitted without a supervisor's signature. The application will be sent to JoAnn Kerian, Marshall County Assessor, for her signature. When the signed application is received at the Board office, it will be placed on the agenda for the meeting following receipt of the application. Until that time, this item is tabled, and Mr. St. Germain will retain Provisional Status.

Marvin Jensen, local assessor, Douglas County. Coursework includes: Course A, ProSource 101 and 102 (approved alternates to weeklong Course B), and Course H. He has part-time experience since November 2004. The Board members spent considerable time in discussion of how much part-time experience is required to equal 12 calendar months of experience. In the case of local assessors, this could be based on how many townships are involved and how much time is spent with a currently licensed assessor to go through the process. The Board decided to accept the documentation Mr. Jensen submitted to define his experience. Gary Amundson made a motion to award the Certified Minnesota Assessor designation to Marvin Jensen. Gregg Larson seconded the motion. The motion carried with one abstention.

The year of experience requirement is still in the discussion stage and will be further discussed at the next meeting.

How many continuing education hours (CEHs) will be given to assessors who take the weeklong courses as refreshers? In the past, assessors who had already taken and passed the course didn't need to take the exam again and were awarded 2.4 CEUs as opposed to 2.7 CEUs for assessors taking the review time and the exam. (No credits were issued for the exam – just the review time). Having made that statement, we assume that four days of course time plus two hours of review on the exam day is 30 hours and each day is worth seven continuing education hours. Any student who misses

a day of class will lose seven continuing education hours for each day missed.

At what point in time will we stop rounding up the 7.5-hour courses and seminars to eight hours? Jan Jackson made a motion to use the May 23, 2006 meeting date as the effective date to discontinue the policy of rounding up a half-hour to the nearest hour for courses and seminars. Doreen Pehrson seconded the motion. The motion carried.

Question from Steve Behrenbrinker on reporting grading results: SCSU tracks students by using the last four-digits of the Social Security number, and we track by using a four-digit license number. Would we consider adding a 0 to the front of the license number to avoid confusion? No, we would not. Would it be difficult to set up the software to do that? While it might be possible, it would be extremely precarious for the software. Steve will be staying in touch to help work this out.

There being no further business, the chairman set the date for the next meeting as Tuesday, September 26, 2006, in conjunction with the MAAO Fall Conference. We will convene at 1:00 p.m. on Tuesday and at 9:00 a.m. on Wednesday, September 27, 2006, in the Dutch Room at Cragun's Resort and Conference Center.

David Marhula made a motion to pay all meeting expenses. Gregg Larson seconded the motion. The motion carried.

David Marhula made a motion to adjourn. Gary Amundson seconded the motion. The motion carried. The meeting adjourned at 3:45 p.m.

MAAO Fall Conference – Cragun's Resort <u>Tuesday and Wednesday</u>, September 26 & 27, 2006

Chairperson Keith Albertsen convened the meeting at 1:00 p.m. in the Dutch Room.

Members in attendance were:

Keith Albertsen, Chairperson Doreen Pehrson, Vice Chairperson Jan Jackson Mike Amo Dave Marhula Steve Sinell Deb Volkert

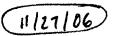
Gary Amundson was teaching a seminar and would join the meeting later. Gregg Larson was unable to attend.

Mel Hintz, St. Louis County, stopped by the meeting to discuss an issue with the Board members. Some research will be done to provide some background on his concerns and an ad hoc committee of members Mike Amo, Jan Jackson, and Dave Marhula was formed. The committee will bring a recommendation to the board that better defines what is required to meet the one year of assessment experience required for the CMA, as well as a recommendation regarding who can sign off on the application to verify the experience.

The minutes of the July 24, 2006, meeting were read and discussed. Dave Marhula made a motion to approve the minutes as read. Mike Amo seconded the motion. The motion carried.

Secretary's Report:

To date, of the 978 license renewal applications sent out, 933 have come into the office; 893 license applications have been processed and the licenses issued; one is on hold awaiting return of an incomplete application, and 39 are applications for Record Retention. There are 40 assessors who have not



State Board of Assessors Meeting Minutes...continued

Accreditation Oral Interview. His education includes: Courses A, B, H, Basic Income Approach, Supervision and Management, IAAO 102, ProSource 105 and a number of seminars. Mr. Iverson's Form Report passed the grading committee in October 2005, and he passed the Residential Case Study Examination in August 2006. Mr. Iverson has three years of assessment experience, and he applied for the Accredited Minnesota Assessor designation. Steve Sinell made a motion to award the Accredited Minnesota Assessor designation to Marc Iverson. Dave Marhula seconded the motion. The motion carried.

Steve Carlson, Polk County, met with the Board for his Accreditation Oral Interview. His education includes: Courses A, B, F, H, J, K, IAAO 102, ProSource 105 and many seminars. Mr. Carlson's Residential Demonstration Narrative Report passed the grading committee in October 2006, and he has 15 years of assessment experience. Mr. Carlson applied for the Accredited Minnesota Assessor designation. Doreen Pehrson made a motion to award the Accredited Minnesota Assessor designation to Steve Carlson. Jan Jackson seconded the motion. The motion carried.

Allan LaBine, Washington County, met with the Board for his Accreditation Oral Interview. His education includes: Courses A, B, H, J, IAAO 102, 400, ProSource 151 and many seminars. His Form Report passed the grading committee in July 2006, and he passed the Residential Case Study Examination in September 2006. Mr. LaBine has 23 years of assessment experience, and he applied for the Accredited Minnesota Assessor designation. Dave Marhula made a motion to deny the Accredited Minnesota Assessor designation to Allan LaBine. Deb Volkert seconded the motion. The motion carried. The board decided to send a letter to Mr. LaBine informing him of the decision and strongly encourage him to interview again.

Penny Vikre, Cass County, met with the Board for her Accreditation Oral Interview. Her education includes: Courses A, B, Mass Appraisal, J, Supervision and Management, ProSource 105, PACE and many seminars. Ms. Vikre's Residential Demonstration Narrative Report passed the grading committee in July 2006, and she has 12 years of assessment experience. Ms. Vikre applied for the Accredited Minnesota Assessor designation. Steve Sinell made a motion to award the Accredited Minnesota Assessor designation to Penny Vikre. Gary Amundson seconded the motion. The motion carried.

Application for Senior Accredited Minnesota Assessor:

David Sipila, St. Louis County. His education includes Courses A, H, K, Appraisal Institute Courses 101 (alternate to B), 510 (alternate to J), 410 (Alternate to IAAO 151), Highest and Best Use (alternate to elective), Basic and Advanced Income Capitalization and many seminars. Mr. Sipila's Form Report passed the Grading Committee in July 2006, and he passed the Residential Case Study Examination in August 2006. Mr. Sipila had a successful oral interview with the Board in September

2006, and he passed the Income Case Study Examination in October 2006. He has 10 years of assessment experience and has applied for the Senior Accredited Minnesota Assessor designation. Jan Jackson made a motion to award the Senior Accredited Minnesota Assessor designation to David Sipila. Gary Amundson seconded the motion. The motion carried.

Discussion items:

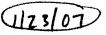
The members of the ad hoc Experience Requirement Committee reported on the discussion at their meeting and presented some handouts containing information from the committee members on what could/should be required and information on the requirement changes from the Appraisal Standards Board. Mike Amo will be doing more research on this subject, and he'll stay in touch with Dave Marhula and Jan Jackson, who also have volunteered to serve on the ad hoc committee. At the current time, ad hoc committee members are working on a set of requirements to be met that could comprise a year of experience. This data will include comments and ideas from the discussion with the Board members at this meeting. There will be an update at the next meeting.

Rebecca Malmquist, Editor of *Equal Eyes*, requested an article from the Board to be included in the next edition of the publication. A draft of a short article was submitted for Board approval. Jan Jackson made a motion to submit the article. Mike Amo seconded the motion. The motion carried.

There being no further business, the chairman set the date for the next meeting as Tuesday, January 23, 2007, at the Minnesota Department of Revenue. We will convene at 9:30 a.m.

Steve Sinell made a motion to pay all meeting expenses. Dave Marhula seconded the motion. The motion carried.

Steve Sinell made a motion to adjourn. Dave Marhula seconded the motion. The motion carried. The meeting adjourned at 3:15 p.m.



State Board of Assessors Meeting Minutes...continued

three years of assessment experience, and he applied for the Accredited Minnesota Assessor designation. Deb Volkert made a motion to award Nathan Stule the Accredited Minnesota Assessor designation. Mike Amo seconded the motion. The motion carried.

John Hagen and Jacque Betz from the Department of Revenue Property Tax Division, met with the Board to discuss the request from the MAAO Weeklong Course Committee to allow the PACE course as a substitution for Minnesota Assessment Administration. (See request for Course Equivalency above.) After some discussion concerning the differences in the two courses, and the possibility of the Department of Revenue to develop a new Minnesota Assessment Administration course, Doreen Pehrson made a motion to deny the request to allow the PACE course as an alternate to Minnesota Assessment Administration. Gary Amundson seconded the motion. The motion carried.

Karla Anderson, Benton County, met with the Board for her Accreditation Oral Interview. Her education includes Courses A, H, successful challenges to Courses J and K, ProSource 101-105 and a Bachelor of Science Degree in Accounting from St. Cloud State University. Appraiser License number: 20293272. Ms. Anderson's Form Report passed the grading committee in January 2007, and she also passed the Residential Case Study Examination in January 2007. Ms. Anderson has five years of assessment experience, and she applied for the Accredited Minnesota Assessor designation. Mike Amo made a motion to award the Accredited Minnesota Assessor designation to Karla Anderson, Jan Jackson seconded the motion. The motion carried.

Discussion Items:

- Correspondence received regarding the repeal of M.S. 82B.225. This is the statute that allowed the Department of Commerce to accept assessment experience for an appraiser license. This statute was repealed in 2005. This was a matter of information.
- Keith Albertsen inquired, as part of the Weeklong Course Committee (WCC), whether the board thought there were any needs not being met by the weeklong courses and asked for ideas. The board discussed the possibility of SCSU putting together seminars concerning apartments, rural, SRR, etc. to meet needs not currently covered in detail by a weeklong course.

Year of experience requirement update. Mike Amo presented a set of handouts that he prepared including some questions and comments on experience and a comparison table which listed current and proposed requirements and tasks. Discussion followed, and the topic will be addressed again at the March meeting.

There being no further business, the chairman set the date for the next meeting as Tuesday, March 13, 2007 at the Minnesota Department of Revenue. We will convene at 9:30 a.m.

Jan Jackson made a motion to pay all meeting expenses. Dave Marhula seconded the motion. The motion carried.

Dave Marhula made a motion to adjourn. Doreen Pehrson seconded the motion. The motion carried. The meeting adjourned at 3 p.m.

2007 State Board of Assessors **Meeting Dates**

9:30 a.m. May:

Tuesday, May 22, 2007

(Note: MAAO Summer Seminars May 23-24, 2007)

Country Inn and Suites

St. Cloud

June:

No meeting

July:

Tuesday, July 17, 2007 Department of Revenue

St. Paul

August:

No meeting

September: No meeting

October:

Tuesday, October 2, 2007 (1 p.m.) and Wednesday, October 3, 2007 (9 a.m)

Holiday Inn

Duluth

(Note: The Board meting will be concurrent with the seminars after the business meeting)

November: No meeting

December:

Tuesday, December 4, 2007

Holiday Inn

St. Cloud

3/13/07 State Board of Assessors Meeting Minutes...continued

2006. Ms. Blagsvedt has three years of assessment experience, and she applied for the Accredited Minnesota Assessor designation. Deb Volkert made a motion to award Cynthia Blagsvedt the Accredited Minnesota Assessor designation. Jan Jackson seconded the motion. The motion carried.

Robert Kleis, Dakota County, met with the Board for his Accreditation Oral Interview. His education includes Courses A. B. H. J. K. ProSource 105 and many approved seminars. Mr. Kleis's Form Report passed the Grading Committee in September 2006, and he passed the Residential Case Study Examination in February 2007. Mr. Kleis has eight years of assessment experience, and he applied for the Accredited Minnesota Assessor designation. Gary Amundson made a motion to award Robert Kleis the Accredited Minnesota Assessor designation. Mike Amo seconded the motion. The motion carried.

Jim Rouleau, Anoka County, met with the Board for his Accreditation Oral Interview. His education includes Courses A, B, H, J, IAAO 400, IAAO 151, the four IAAO correspondence courses (two of which are income courses) and a number of seminars. Mr. Rouleau's Form Report passed the Grading Committee in October 2006, and he passed the Residential Case Study Examination in January 2007. Mr. Rouleau has nine years of assessment experience, and he applied for the Accredited Minnesota Assessor designation. Dave Marhula made a motion to award the Accredited Minnesota Assessor designation to Jim Rouleau. Steve Sinell seconded the motion. The motion carried.

Tom Kunik, Hennepin County, met with the Board for his Accreditation Oral Interview. His education includes Courses A, B, H, J, K, ProSource Courses 101-105, and many seminars. Mr. Kunik's Form Report passed the Grading Committee in November 2006, and he passed the Residential Case

Study Examination in February 2007. Mr. Kunik has nearly seven years of assessment experience, and he applied for the Accredited Minnesota Assessor designation. Jan Jackson made a motion to award the Accredited Minnesota Assessor designation to Tom Kunik. Dave Marhula seconded the motion. The motion carried.

Discussion Items:

License check – should we be conducting a check of some sort to ensure that assessors are licensed and that it is at the appropriate level. In response to our proposed legislation, a representative inquired about M.S. 270.48 which requires persons assisting an assessor with the valuation or classification of property to be licensed within three years. How many people does that involve (working within the three-year limit but not licensed)? No one has information available, however, should we also be checking into that? If not the Board, should someone else? Discussion on this subject concluded that any checking on this requirement should be done at the county level, and the county assessor is the person responsible for making sure that anyone who should be licensed is licensed and within the appropriate amount of time. Discussion then turned to the language in the statute which does not address who is responsible for making sure the licensure requirements are met. Deb will check with Appeals and Legal Services on a possible language change that will clarify the responsibility.

Ouestion received from an individual in Otter Tail County - Is it permissible for an assessor employed by a county to receive a referral percentage of a real estate commission from properties in that same county? The Board's response was "No," because to do so could give the appearance of an impropriety. A letter from the Board of Assessors will be sent to the individual who made the inquiry.

Revision of the Oral Interview Questions - Mike Amo distributed a draft of some

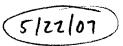
revisions to the Oral Interview Questions. The board discussed the questions and responses and made several changes. A draft of the new set of questions will be distributed at the next meeting. The current questions will be used until changes are adopted.

Year of Experience Requirement - Keith Albertsen shared some of the comments he received from members of the Education Committee about the year of experience requirement. Comments received included, "If it's not broken, don't fix it" and "Add a second signature line for the county assessor." The issue appears to be that while a second signature from the county assessor might work, what is the countyassessor attesting to and is the county assessor responsible for the applicant? If the county assessor has no knowledge of the applicant and does not sign the application, will a license be issued? The Board will be continuing this discussion at future meetings.

There being no further business, the chairman set the date for the next meeting as Tuesday, May 22, 2007 at the St. Cloud Holiday Inn in conjunction with the MAAO Summer Seminars. We will convene at 9:30 a.m.

Jan Jackson made a motion to pay all meeting expenses. Dave Marhula seconded the motion. The motion carried.

Dave Marhula made a motion to adjourn. Doreen Pehrson seconded the motion. The motion carried. The meeting adjourned at 3 p.m.



Oral Interview. Her education includes Courses A, B, H, J, a successful challenge to Course K, IAAO 102, 151 and many approved seminars. Ms. Gustafson's Form Report passed the Grading Committee in June 2006, and she passed the Residential Case Study Examination in March 2007. Ms. Gustafson has four years of assessment experience, and she applied for the Accredited Minnesota Assessor designation. Deb Volkert made a motion to award Julie Gustafson the Accredited Minnesota Assessor designation. Jan Jackson seconded the motion. The motion carried.

Applications for Senior Accredited Minnesota Assessor:

Randall Mertz, Renville County. His education includes Courses A, B, H, J, K, IAAO 102, 410 (USPAP), Form Report Writing & Residential Case Study Exam Workshops, and many other seminars. His Form Report passed the Grading Committee in October 2003, and he passed the Residential Case Study Examination in June 2005, and the Income Case Study Examination in March 2006. Mr. Mertz had a successful oral interview with the Board in June 2005, and he will meet the five year experience requirement on June 17, 2007. Mr. Mertz is applying for the Senior Accredited Minnesota Assessor designation. Jan Jackson made a motion to award Randall Mertz the Senior Accredited Minnesota Assessor designation to become effective on June 17, 2007. Doreen Pehrson seconded the motion. The motion carried.

Jim Rouleau, Anoka County. His education includes Courses A, B, H, J, IAAO 400, IAAO 151, the four IAAO correspondence courses (two of which are income courses) and a number of seminars. Mr. Rouleau's Form Report passed the Grading Committee in October 2006, and he passed the Residential Case Study Examination in January 2007 and had a successful Oral Interview with the Board in March 2007. Mr. Rouleau also passed the Income Case Study Examination in March 2007. He has 24 years of assessment experience and

is applying for the Senior Accredited Minnesota Assessor designation. Dave Marhula made a motion to award the Senior Accredited Minnesota Assessor designation to Jim Rouleau. Gary Amundson seconded the motion. The motion carried.

Discussion items:

Year of Experience Requirement: Should a second signature line (county assessor) be added? No.

Should a Board of Review be included in the experience requirement? Yes.

Should this be included in the education and licensing manual? Yes.

Who is responsible if the county assessor declines to sign the application? Moot point no signature required.

Will a license be issued without the second signature? Moot point – no signature required.

Oral Interview Questions: Draft of the edits to Mike's revision is included in the packet.

These three additional questions written by Gary Amundson will be added to the Oral Interview Questions:

What would you do if you were asked to do the assessment in a jurisdiction in which your parents owned property?

How would you respond to a request to do an appraisal on a property to determine a value for probate proceedings located in a district where you are currently responsible for the assessment?

Why is ethical behavior in the assessment process and how would you define assessor ethics?

A question from Carol Schutz, Chippewa County assessor: There is a farmer in her county who is interested in becoming a local assessor, and he wishes to take assessor courses online from the IAAO.

These would be the four self-programmed or "correspondence courses" that were the previous alternate to Week B and the elective. Is this still an alternate? Research into old minutes does not indicate any discussion on acceptance of these courses after the effective date of July 1, 2006 which changed the two week Course B requirement. In addition, the IAAO has added a fifth computer course to the four that were accepted as alternates to the old Course B and elective. Should the self-programmed computer courses still be accepted, and does the Board wish to incorporate this fifth course into the requirement?

Answer: It should be noted that all requests for use of these computer courses will be handled on a case-by-case basis and a request for approval from the Board must be made prior to taking the courses or no credits will be issued. In this instance, the four courses will qualify, but only for the two week course B requirement, but the fifth course is not an alternate to anything and, therefore, is not accepted. These four courses are not an alternate to the elective, so the Board highly recommends that Mass Appraisal Basics be attended to meet the elective requirement.

There being no further business, the chairman set the date for the next meeting as Tuesday, July 10, 2007 at the Minneosta Department of Revenue. We will convene at 8:30 a.m.

Jan Jackson made a motion to pay all meeting expenses. Dave Marhula seconded the motion. The motion carried.

Dave Marhula made a motion to adjourn. Doreen Pehrson seconded the motion. The motion carried. The meeting adjourned at 2:30 p.m.

FALL 2007 EQUAL EYES 11